

Public Employees' Retirement Fund

Request for Estimate of Benefits

Instructions for Preparation

1. We can only provide an estimate of benefits once you are within one year of being eligible for retirement. That is when you are:

Age 50 with 15 years of service (for reduced benefits)

Age 60 with 15 years of service

Age 65 with 10 years of service

You are at least 55, and your age and years of service add up to 85
(Rule of 85)

Requests from members that do not meet the eligibility criteria will not be answered.

2. We can provide only one Estimate of Benefits within any 12 month period.
3. Because estimates are prepared based on current information, actual benefits received at the time of retirement may differ.
4. Anticipated date for beginning benefits. Benefits cannot begin earlier than the first day of the first full month after the last day of work. For example, if your last day of work is January 1st, the earliest benefits can begin is February 1st. If your last day of work is January 31st, the earliest benefits can begin is February 1st. Also, we are not allowed to pay retroactive benefits for more than six months prior to the date your retirement application is received.
5. Beneficiary Information. If no beneficiary information is provided, we will provide estimates only for Options 10, 20, and 71.
6. When you have completed this form, mail it to:

Public Employees' Retirement Fund
143 West Market Street
Suite 800
Indianapolis, IN 46204



Public Employees' Retirement Fund Request for Estimate of Benefits

We cannot estimate your retirement benefits unless you are within one year of beginning those benefits. An estimation of your monthly benefit can only be done once a year. Members who want estimates otherwise should request from the Public Employees' Retirement Fund a copy of the booklet "Estimating Your Retirement Benefits".

Member Information and Address

Name: _____

First

Middle

(Maiden)

Last

Address: _____

Street

City

State

ZIP Code

Telephone: (_____) _____

Date of Birth: _____

(Month/Day/Year)

Social Security Number: _____

Anticipated date for beginning benefits (Month/Day/Year): _____

Anticipated last day at work (Month/Day/Year): _____

The law states that a member who is eligible for normal or early retirement is entitled to choose a retirement date on which their benefit begins if the following conditions are met:

1. The application for retirement benefits and the choice of date is filed on a form provided by the Public Employees' Retirement Fund Board of Trustees.
2. The date must be after the cessation of their service and be the first day of the month.
3. The retirement is not more than six months before the date on which the application is received by the Board.

Beneficiary Information

Name: _____

First

Middle

Last

Date of Birth (Month/Day/Year): _____

Social Security Number: _____

Relationship to Member: _____

Signature of Member

Date

Return to:

**Public Employees' Retirement Fund
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